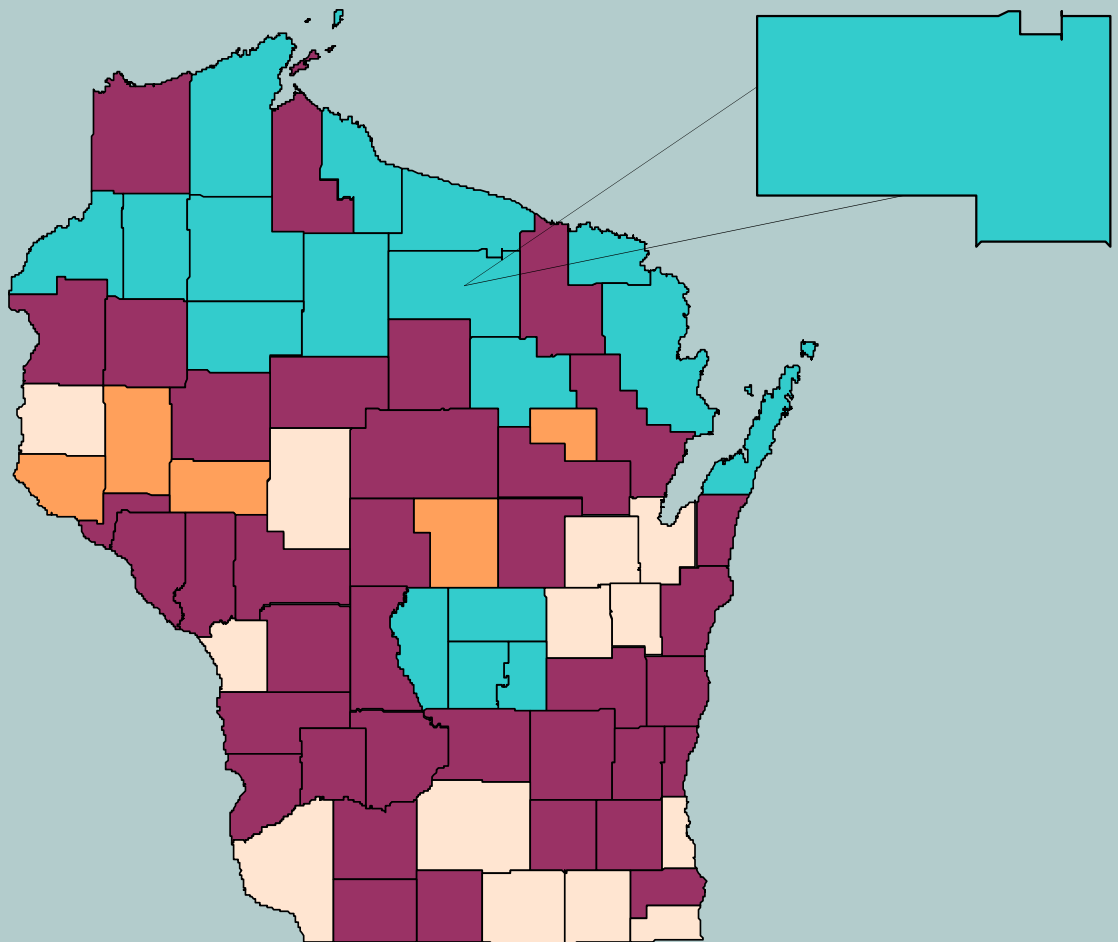


Oneida County Workforce Profile

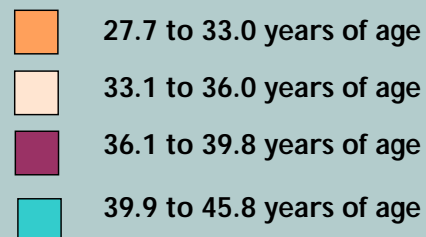
Median Age by County, 2000



Your complete
guide to the
state of the
labor force of
today and a
glimpse into
the economy of
tomorrow.



State of Wisconsin
Department of Workforce Development
October 2002 (rev. 3/2003)



Source: Census 2000 of the United States



County Population

Between 1990 and 2000, about 5,100 people added to the total population of the county. This represented approximately 16 percent growth, which was faster than both the state and national rates of growth over that decade. This higher rate of growth is completely due to net in-migration of residents, most of which are probably older retirees. In fact, Oneida County shows a *natural decrease* in population when comparing the number of births to the number of deaths in the county between the two census periods, meaning that deaths outnumbered births in the county. Oneida County was one of 16 counties in Wisconsin to show such a natural decrease.

Although Oneida County is predominantly a rural area, with tourism activity a major part of the local scene, the county has for some time offered a good prospect for retirement living, along with the neighboring areas. Oneida County has one of the highest rates of seasonal housing in a state that is highly ranked on this scale, nationally. Seasonal housing is a major factor in the decision process in deciding retirement homesteads so it is no surprise to see a population that is older than state average, which it is, and to see population growth come ex-

clusively from inward migration.

The Oneida County population growth over the brief period of 2000 to 2001 was only a bit slower than that of either Wisconsin or the United States. Population increase in the larger municipalities of the county, notably Rhinelander, were fairly small compared to the smaller towns and villages of the area. Housing units themselves increased by about 1,400 in the ten year period of 1990 to 2000, much of this recreational, or vacation building of fairly high cost and value. This will have the effect of increasing the tax base of most of the towns of the county, as well as the amount of revenue.

2002 estimates show Oneida County's population is on a pace to grow by almost 11 percent from the time span of 2000-2010. This is faster than the state's pace. This should not be confused with projections as population growth just about everywhere in Wisconsin is projected to be considerably slower than the 1990 to 2000 period. County level population projections are not available at the time of publication.

Total Population

	2000 Census	January 1, 2001 Estimate	Percent change
United States	281,421,906	283,474,000	0.7%
Wisconsin	5,363,675	5,400,449	0.7%
Oneida County	36,776	37,002	0.6%

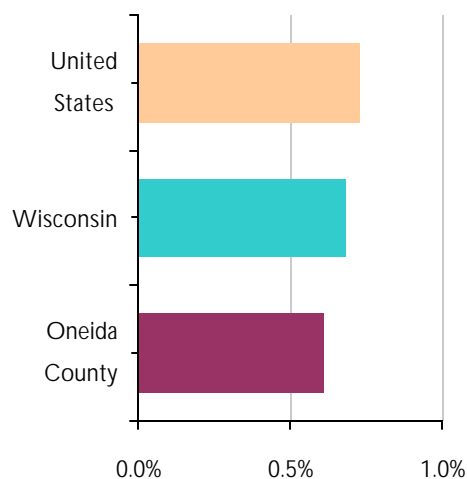
Ten Largest Municipalities

Rhinelander, City	7,735	7,734	0.0%
Minocqua, Town	4,859	4,894	0.7%
Pelican, Town	2,902	2,926	0.8%
Newbold, Town	2,710	2,754	1.6%
Pine Lake, Town	2,720	2,746	1.0%
Three Lakes, Town	2,339	2,351	0.5%
Crescent, Town	2,071	2,070	0.0%
Woodruff, Town	1,982	1,996	0.7%
Sugar Camp, Town	1,781	1,799	1.0%
Nokomis, Town	1,363	1,367	0.3%

* Oneida portion only

Source: Wisconsin Department of Administration, Demographic Services, 2002

Population Growth 2000-2001

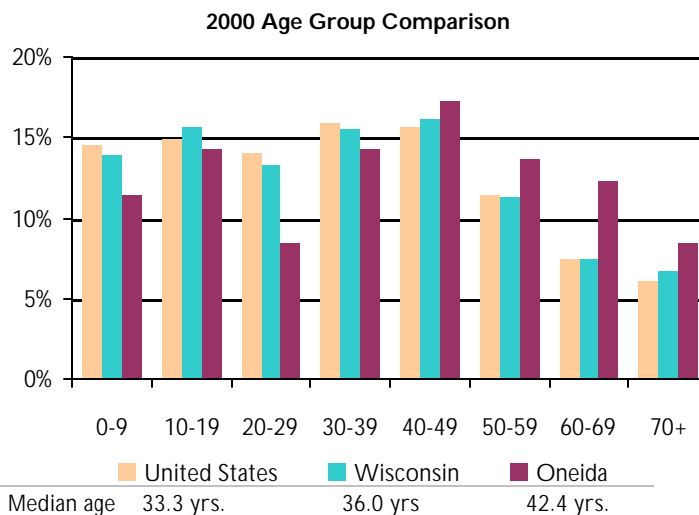




The labor force is composed of two main elements-people who are working (either full time or part time) and people who are not working, but looking for work. These may be first time entrants, workers released from their last job and seeking another, or those reentering the workforce after a period of time. Typically, the latter category are retired workers returning to work and female workers going back to work after a number of years.

An interesting way to look at the labor force of the county is by age groups and what the numbers of people are that are in the labor force from each group, or cohort. This information will indicate future demographic challenges, for example, the approaching worker crunch due to the so-called "baby boomer" retirements and the impact that will have on occupational shortages in many areas. Oneida County has a large number of workers in these older age categories.

A brief look at the different age groups in Oneida County shows some differences from the state and national averages. At the latter end of the scale, for instance, in the range of ages 50-70+, the propor-

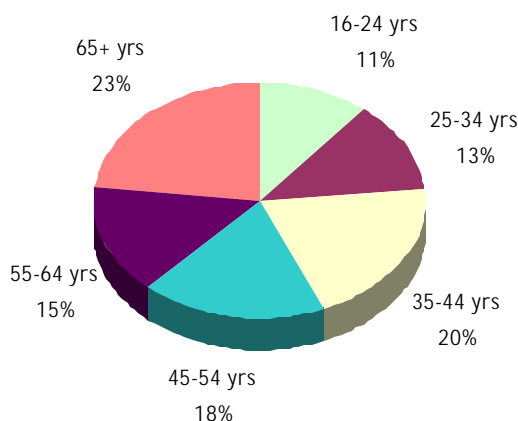


Source: US Department of Commerce, Census Bureau, *Census 2000*

tion of these people is quite a bit higher than Wisconsin or the nation. Considering the ages between 20-49, or what one might call the prime working years, the Oneida County totals, especially in the younger cohorts, are below average, which will serve to increase pressure during shortages of workers for entry level jobs of all kinds.

County Civilian Labor Force

Oneida County Labor Force Age Groups



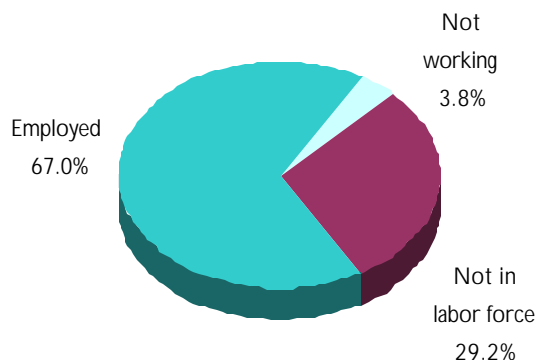
Source: US Dept. of Commerce, Census Bureau, *Census 2000*

Those ages 55 and over in the Oneida County labor force are about 38 percent of the total eligible for the labor force. The other age cohorts (ages 16 through 54) compose the remainder of those eligible for the labor force statistics. This composition is slightly different than most of the other counties of the state, with a showing a higher percentage of older workers. Although there is no upper limit to the age of those in the labor force, in reality it is questionable if many members of the 65+ element are looking for work, or interested in working at all. Although in recent years, older workers have been returning to the labor force in increasing numbers, the exact number is hard to place and reliable statistics for the more rural areas of the state do not exist. Those aged 16-34 are quite scarce relative to the state average.



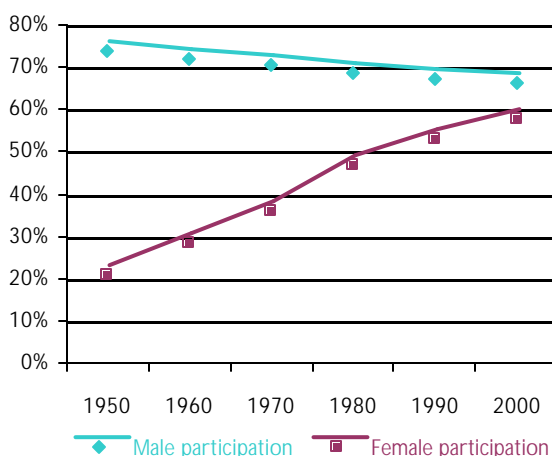
State of Wisconsin - Oneida County

2001 Labor Force Participation



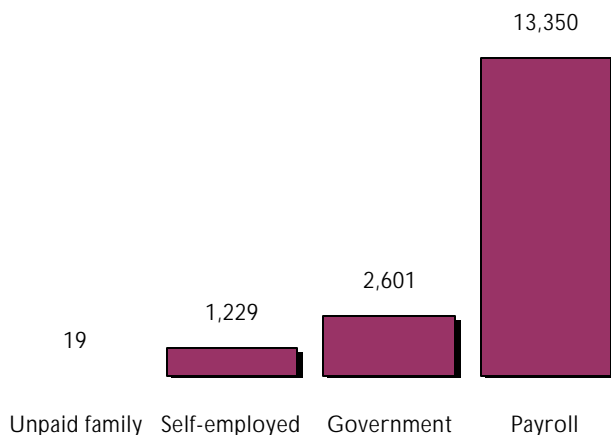
Source: Estimated from WI Dept. of Administration population estimates, Jan. 2001, US Census Bureau, and WI Local Area Unemployment Statistics.

Labor Force Participation of Male and Female Residents



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

Type of Employment



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

Sixty-seven percent of the people over the age of 16 in Oneida County are employed. This could be either full time or part time. This level of employed is only slightly lower than the state average and is a bit higher than other counties in the northern part of the district. Those in the "not working" segment of the pie chart at the left are seen as in the labor force and looking for work, but not yet employed, thus, the labor force participation rate is 70.8 percent. The number of people in the labor force in Oneida County increased to about 20,700 in 2001 from 20,400 in 1996. This is a very healthy increase for any northern Wisconsin county of the River District and especially for a county in the more rural northern part of the state.

An interesting phenomenon occurring in Oneida County and elsewhere as well, is the growing number of women entering the labor force. This movement, which began in earnest after WW II, has been increasing strongly since the early 50's as more women of all ages entered the workplace for both part and full time work. The increase in female participation in Oneida County has been more rapid than in other areas of the River District and at present rates of increase may equal that of male participation in a few years. Male rates of participation stood at about 75 percent in the post war years and have declined to just under 70 percent in the recent past. This level of decline is on a par with other Wisconsin Counties. The rise of female participation in Oneida County over the last 50 years can be accounted for in many different ways, but it is likely that economic necessity is the main reason—they are working or looking for work because they must to maintain a family's standard of living.

Labor force participation has arguably peaked; at least for the foreseeable future. This is more of a demographic issue rather than economic one. As the population ages and the willingness or need to work wanes, then these annual participation rates will follow suit. This is not unique to Oneida, Wisconsin—not even to the United States. The world's population is aging, especially in industrialized countries and these age disparities will continue for years. How local economies deal with these issues will be extremely important for economic viability.

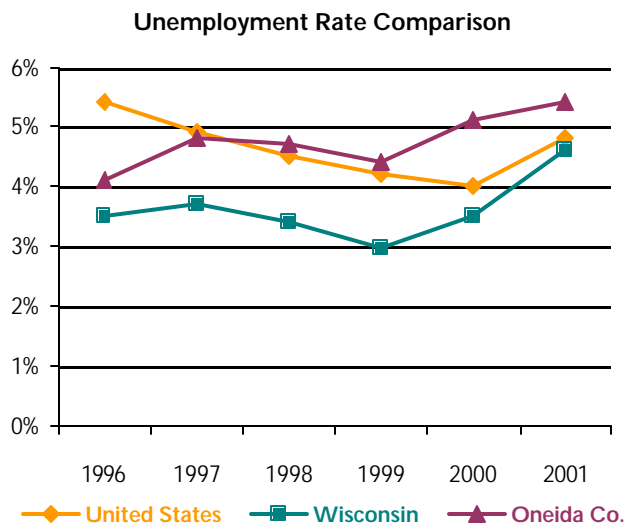


State of Wisconsin - Oneida County

(Note - Although these 1990 Census Commuting numbers have not yet been updated by the 2000 Census, we do not anticipate any significant changes in the general pattern of movement.)

From a total labor force of about 20,700 in Oneida County in 2001, many leave the county each day to work elsewhere. The vast majority of these commuting workers drive to Vilas County than to any other county, and those entering Oneida County from Vilas are nearly twice that many (perhaps over 1,400), most of them probably working in the Rhinelander area.

It is impossible to say what kinds of jobs these Oneida resident workers are commuting to, or what their professions are. They may be stable, permanent types of jobs, such as professional employment, or perhaps jobs in the manufacturing industry in a neighboring county. Or possibly, they are the kinds of jobs that typically take a person some distance from his or her home, like seasonal construction work. The City of Rhinelander in the northern part of the county has always attracted workers from other areas, sometimes from as far away as

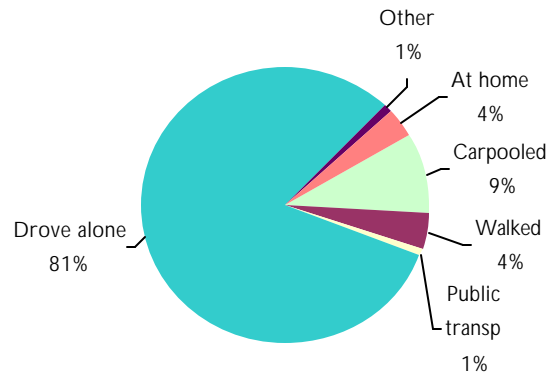


Oneida County Civilian Labor Force Data

	1996	1997	1998	1999	2000	2001
Labor Force	20,400	20,500	20,400	20,000	20,200	20,700
Employed	19,500	19,500	19,400	19,200	19,200	19,600
Unemployed	840	990	960	880	1,040	1,120
Unemployment Rate	4.1%	4.8%	4.7%	4.4%	5.1%	5.4%

Source: WI Department of Workforce Development, Local Area Unemployment Statistics, revised March 2002

County Travel-to-Work Patterns



Source: US Dept. of Commerce, Census Bureau, Census 2000

Tomahawk and Gleason, to work in local paper mills and other factories.

A look at the travel-to-work patterns of Oneida County workers reveals some interesting things about Oneida County workers and their driving habits. Not surprisingly, most people drive to work alone. This is the pattern in other places as well, (inside and outside of Wisconsin), even where carpooling is strongly encouraged. Just over nine percent of work drivers carpool (how many in each car is not known). The percentage of people taking public transportation stands at almost about one percent, and this low number is typical of an area without a regular bus service.

Rates of unemployment in Oneida County since mid-1996 have tended to be just a bit above both the national and state averages. The percentage of people in the labor force not working has risen steadily in the period of 1996—2001, but is still much lower than historical levels typical of certain periods in the 70's and 80's. The only really worrisome clouds on the horizon are the plant closings in Rhinelander and ongoing overcapacity in the paper industry, which will certainly affect the county in years to come.



County Industry Employment

Nonfarm Wage and Salary Employment

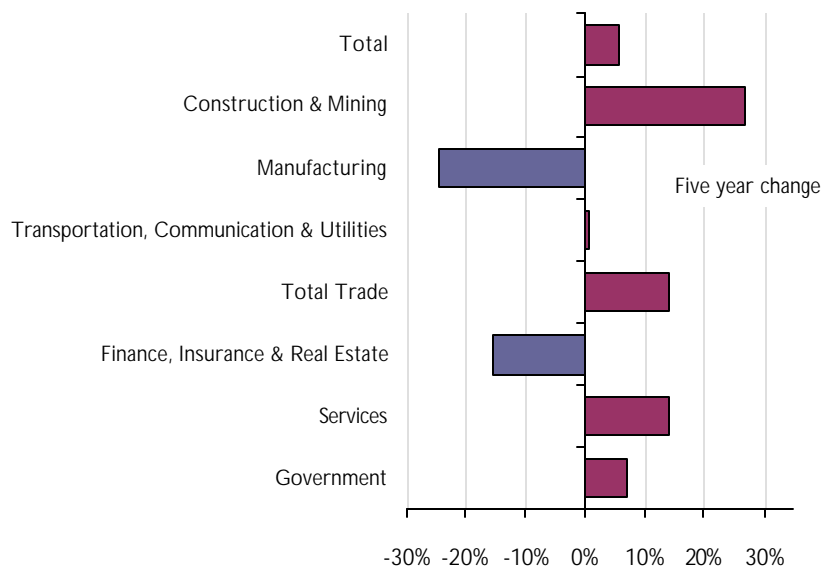
	1996	1997	1998	1999	2000	2001	Percent change	
							1 year	5 year
Total	17,150	17,427	17,656	18,015	18,082	18,159	0.4%	5.9%
Goods Producing	3,773	3,744	3,587	3,537	3,337	3,345	0.2%	-11.3%
Construction & Mining	958	1,033	995	1,085	1,172	1,216	3.8%	26.9%
Manufacturing	2,814	2,712	2,592	2,452	2,165	2,129	-1.7%	-24.4%
Durable	1,522	1,433	1,415	1,334	1,068	1,039	-2.7%	-31.7%
Nondurable	1,293	1,279	1,177	1,118	1,097	1,090	-0.6%	-15.7%
Service Producing	13,377	13,683	14,069	14,479	14,745	14,814	0.5%	10.7%
Transportation, Communications & Utilities	693	709	703	706	693	696	0.4%	0.5%
Total Trade	4,652	4,649	4,715	5,063	5,189	5,306	2.3%	14.1%
Wholesale	589	588	574	462	465	535	15.0%	-9.1%
Retail	4,064	4,061	4,141	4,601	4,724	4,771	1.0%	17.4%
Finance, Insurance, and Real Estate	557	553	491	493	480	470	-2.0%	-15.5%
Services & Misc.	4,959	5,197	5,506	5,551	5,662	5,646	-0.3%	13.9%
Total Government	2,516	2,575	2,654	2,666	2,720	2,695	-0.9%	7.1%

Source: WI Department of Workforce Development, Nonfarm wage and salary estimates, revised March 2002

Nonfarm wage and salary employment measures the number of jobs within a county excluding military, and self-employed workers. This data measures the number of jobs within the county without consideration of where the job-holder lives. Thus, this information is often referred to as "place of work" data. When one looks at the employment picture in Oneida County by industry over the pe-

riod 1996 to 2001, there were increases in the job levels of some industrial sectors and significant declines in others. Manufacturing lost about 700 jobs over that five year period, which is substantial for a county of this size. FIRE also declined in this period, but not as significantly.

Employment Change by Industry Division: 1996 to 2001



Source: WI DWD, Nonfarm wage and salary estimates, revised March 2002

The employment picture of Oneida County bears watching in the years to come as present employment trends indicate negative growth in manufacturing employment. As a paper producing county, Oneida finds itself in the same position as others in the district where paper is a major player—world overcapacity and competition are creating concerns over the future of this industry. But it is not paper alone in Oneida County that bears watching. Recently a machine tool manufacturer closed it's doors here (not yet reflected in the charts here) and this can only mean the loss of more high paying jobs from the county labor market. Construction and total trade employment has shown strong growth. Services employment will also be part of Oneida County's future.



State of Wisconsin - Oneida County

Top 10 Employers

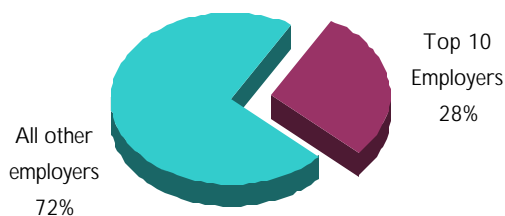
Company	Product or Service	Size
Howard Young Medical Group	Health Care & Related	500-999
Petersen Health Care of Wisconsin	Health Care & Related	500-999
Rhineland Paper Co. Inc.	Paper Products	500-999
Sacred Heart - St. Mary's Hospitals	Health Care & Related	500-999
Foster & Smith Inc.	Pet Care Wholesaler	500-999
School District of Rhineland	Public Education	500-999
T A Solberg		250-499
Wal-Mart	Retail Sales	250-499
County of Oneida	Public Employment	250-499
Nicolet Vocational College	Vocational Education	250-499

Top 10 Industry Groups

Industry Group	March 2001		Numeric change	
	Employers	Employees	1-year	5-year
Health Services	56	2,728	69	236
Eating and Drinking Places	117	1,385	65	62
Educational Services	10	1,300	-62	14
Miscellaneous Retail	69	754	-1	358
Paper and Allied Products	*	*	*	*
Food Stores	17	604	-11	9
General Merchandise Stores	*	*	*	*
Industrial Machinery and Equipment	10	576	-50	-380
Business Services	37	568	-8	-31
Automotive Dealers & Service Stations	39	557	-9	-66

*data suppressed to maintain confidentiality

Top 10 Employers' Share of Nonfarm Employment



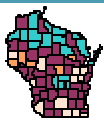
Top 10 Industry Group Share of Nonfarm Employment



Source: WI Department of Workforce Development, ES-202 file tape, December 2001

When one looks at the industrial landscape of Oneida County, one of the most obvious features is the relatively large size of individual businesses for a rural county. The larger employers in the county have 500 employees or more. The mix is everything between manufacturing and smaller businesses catering mainly to the tourist trade. Many small manufacturers produce things exclusively for this sector, such as docks and piers, floats, and related items.

The larger private sector employers are a cross section of the industrial spectrum - manufacturing, service, and trade, and health care. This variety is a healthy condition in any labor market. In Oneida County, the top ten industries portion of the employment picture is about 30 percent, which is a good balance for this county.

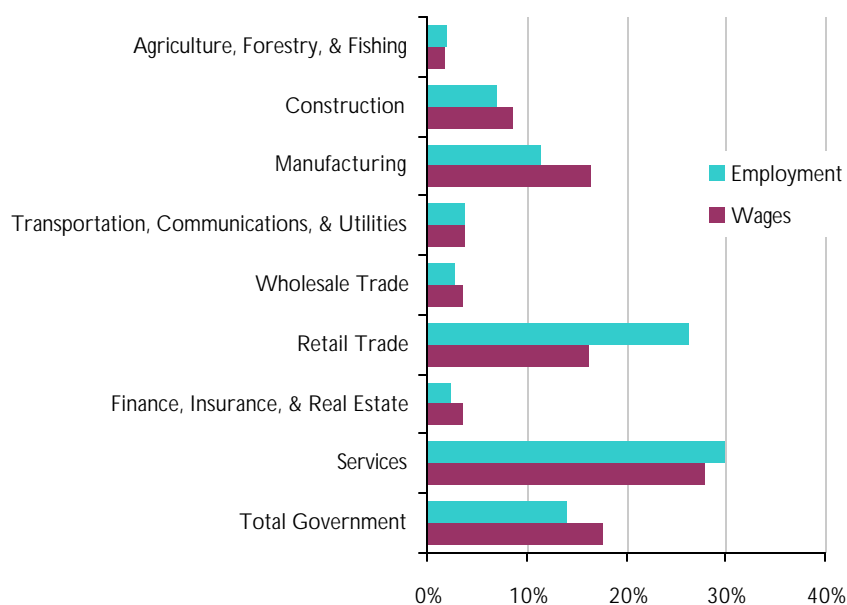


State of Wisconsin - Oneida County

When looking at the table at the bottom of the page, the one thing that seems to stand out is the fourth column, indicating the *percent of the state average* wage paid in different industries in Oneida County. The wage levels in Oneida County are almost all below the state average (except for construction and retail trade, and agricultural jobs), some by as much as over about 20 percent. Retail trade pays quite a bit over the state rate, which may seem unusual for a smaller northern county, except that the labor shortage in retail in recent years has caused wages to increase considerably. Things are

so tight in this area that a large number of "guest" workers enter the area each year from all over the world to supplement the local worker supplies. Manufacturing is rather low at just over 8 percent below the state average, and still has to compete somewhat with Vilas County, and especially, Lincoln County employers. Transportation and utilities, another high paying industrial category in most areas of the state, comes in even lower than manufacturing. Occupational elements of this sector would be local hauling, pulp truck hauling, and others, which in this part of the state often pay close to minimum wage or just above.

Employment & Wage Distribution by Industry Division



Considering the employment and wage distribution in Oneida County, several things stand out. Services employment (read: health services) accounts for a higher percentage of employment than any other sector in the county. The only sector close is retail trade. Government employment also has a strong showing. The largest share of the total wages paid seems to be going to services (about 30 percent). A significant number of jobs in the latter sector are found in health care, a very strong element in the local labor market in recent years related to expansion of health care in the north in recent years. Health care services is projected to be the largest industry in Wisconsin's future.

Annual Average Wage By Industry Division

	Oneida Co. Annual Average Wage	Wisconsin Annual Average Wage	Percent of State Average	1-year percent change	5-year percent change
All Industries*	\$ 25,594	\$ 30,922	82.8%	2.5%	20.3%
Agriculture, Forestry, & Fishing	\$ 22,664	\$ 22,565	100.4%	-0.3%	15.9%
Construction	\$ 31,040	\$ 39,011	79.6%	-0.8%	24.1%
Manufacturing	\$ 36,735	\$ 39,739	92.4%	1.6%	28.1%
Transportation, Communications, & Utilities	\$ 26,556	\$ 36,639	72.5%	1.3%	17.8%
Wholesale Trade	\$ 32,499	\$ 40,521	80.2%	3.6%	42.9%
Retail Trade	\$ 15,769	\$ 14,596	108.0%	6.0%	25.0%
Finance, Insurance, & Real estate	\$ 38,284	\$ 40,933	93.5%	-3.1%	40.6%
Services	\$ 23,892	\$ 28,775	83.0%	3.8%	22.3%
Total Government	\$ 32,004	\$ 33,785	94.7%	5.2%	17.1%

* Mining excluded from table since wages were suppressed to maintain confidentiality in every county

Source: WI DWD, *Employment, Wages, and Taxes Due covered by Wisconsin's U.C. Law, 2002*



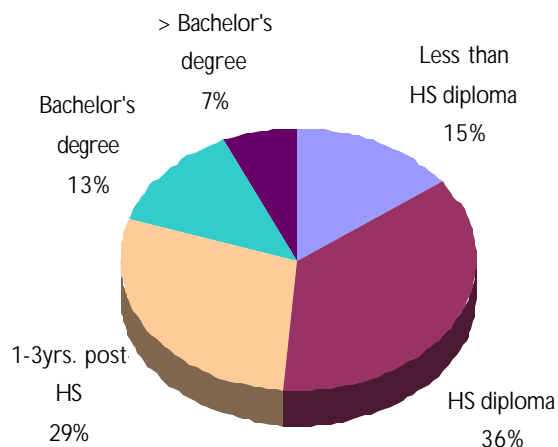
Occupation and Education Characteristics of County Population

It should not be surprising that the occupational profile of Oneida County is going to be different than that of the state, or most other counties, for that matter. Taking a close look at the occupational makeup of any area—county, city, state—especially when making comparisons with other areas can tell us a few things about what the working people there do, which industries are prominent in the area, and by extension, what the needs of the businesses involved are going to be as far as worker skills are concerned. What this often indicates, among other things, is the issue of the collective educational attainment of local residents, and more importantly, does it match the local needs of the economy?

In a general sense, it may be hard to tell which comes first, the need for certain skills in any given labor market, or the aspirations and career plans of individuals. That would depend on the point of view one takes. But ultimately, people go to where the jobs are, which may help to explain the current “brain drain” phenomenon in Wisconsin. When one looks at Oneida County and compares educational attainment with employment levels by occupation, what relationship exists between them?

Not surprisingly, the majority of people have a high

Education Attainment in 2000



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

Employment by Occupation Group: 2000



US Department of Commerce, Census 2000

school diploma, with just under 15 percent not having graduated. Beyond high school, another 49 percent or so have taken further study, the majority of these probably in areas of vocational preparation. All college level graduates compose about 20 percent of the 25 years and older population. This is higher than most northern Wisconsin counties and is on par with the larger counties to the south.

The number of professional level occupations in Oneida County are slightly lower than the state average. Jobs in sales (wholesale and retail trade) are a bit higher than the state average, as are service jobs. This may roughly accord with the educational profile of the county, with its somewhat higher number of highly educated workers compared to the 51 percent or so of high school grads and below. Presumably, people with high school education, terminus, would be in the blue collar sector of the work force. Most other occupational elements in Oneida County compare well with state percentages, however.



County Income Information

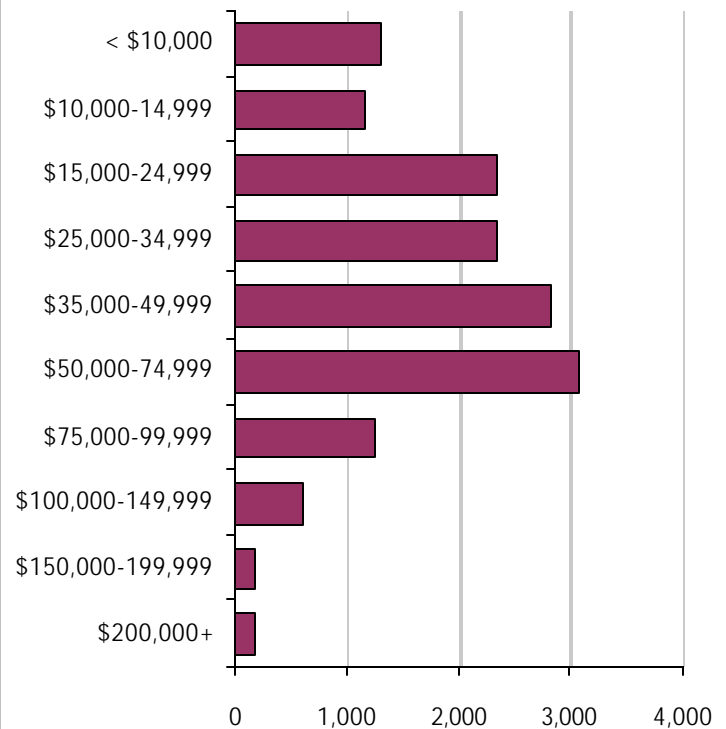
Per capita income is total income divided by the total number of residents. Income includes wages earned from jobs, dividends from investments, and transfer payments from the government. Oneida County's per capita personal income was about \$2,100 below that of the state in 2000.

Per capita personal income can be influenced by the number of wage earners, average family size, and is just as much a product of population dynamics as it is in the number of dollars in the county. Per capita income can influence the type of services and housing available within a county. Over the past five years, Oneida County per capita income has increased by about \$4,100, or about 19 percent over the period. This is not an inconsiderable increase for a rural northern county, and stands up well when compared to the state.

Wages paid for work within a county can impact the type of goods and services purchased. Examining wage structures can be an important part of the hiring process for both job seekers and employers. Wages in Oneida County, especially in the trade, service, and manufacturing sectors, will not compare as highly paid as other occupations. Two aspects of income where Oneida is somewhat above the rest are dividend/interest payments and transfer payments, pulling ahead slightly of both the state and the nation proportion of total income.

Households by Income Range

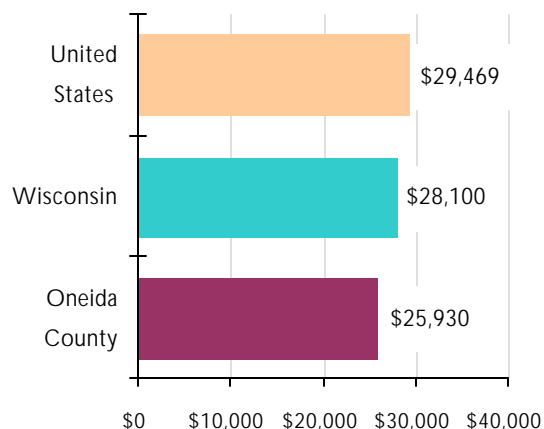
Median household income in Oneida Co. \$37,619



Source: US Dept. of Commerce, Census Bureau, *Census 2000*

It is likely that these represent retirement payments of one kind and another for residents of the county.

Per Capita Personal Income 2000



Source: US Department of Commerce, Bureau of Economic Analysis

Components of Total Personal Income: 2000

